

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

INTRODUCTION

Overview:

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

Purpose:

Saving the time of the customers who want to book it by using CRM application of booking a Visa slot. Wandering for booking the Visa slot and

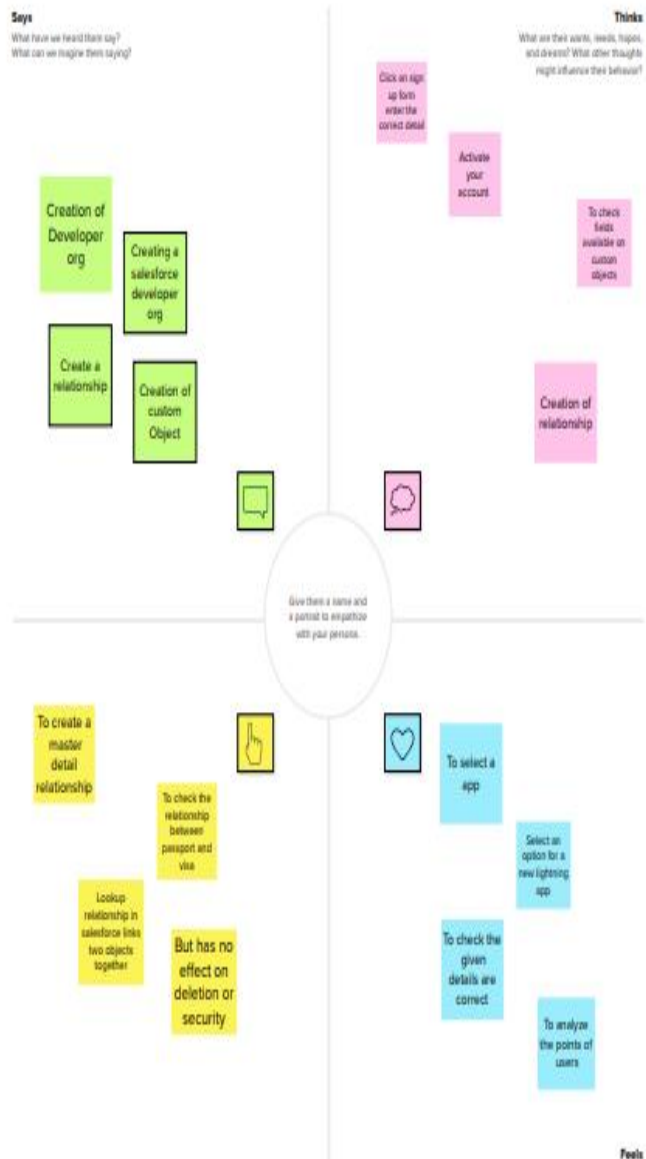
tracking can be reduced here. Reduce the paper filling as much the customer expecting. Ensuring the safety of the customers and panic of many verifications.

PROBLEM DEFINITION AND DESIGN THINKING:

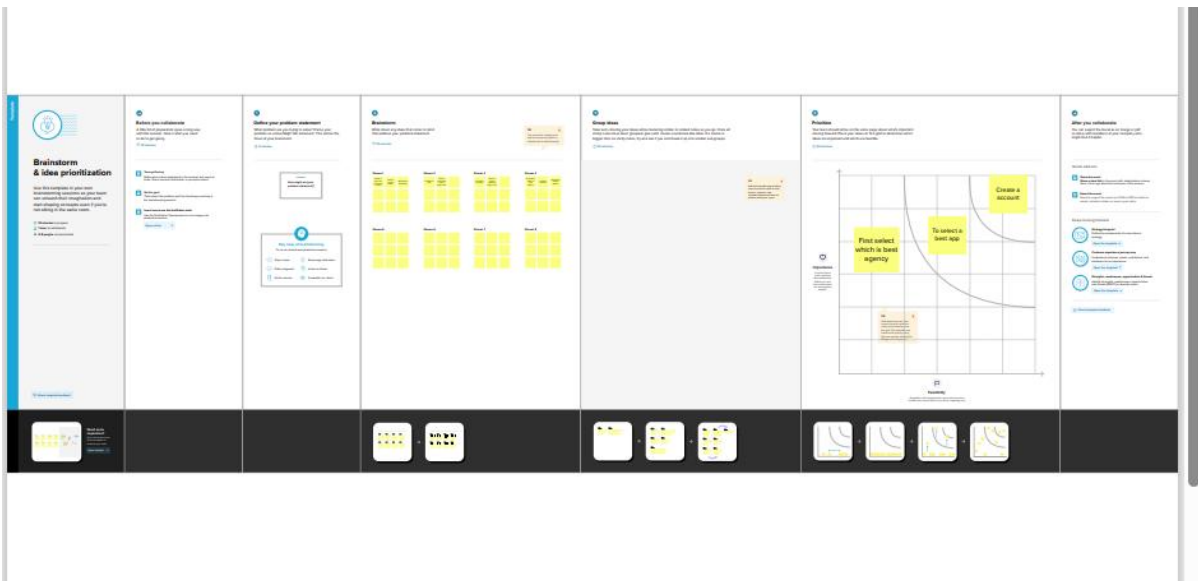
Empathy map:

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



Ideation and Brainstorming map:



Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

Person 1

Select a best visa processing center	Given a correct details	Manage the availability

Person 2

Creation of user	Select a government agency apply a visa	

Person 3

To select a best app	Given a correct details to apply a visa	

Person 4

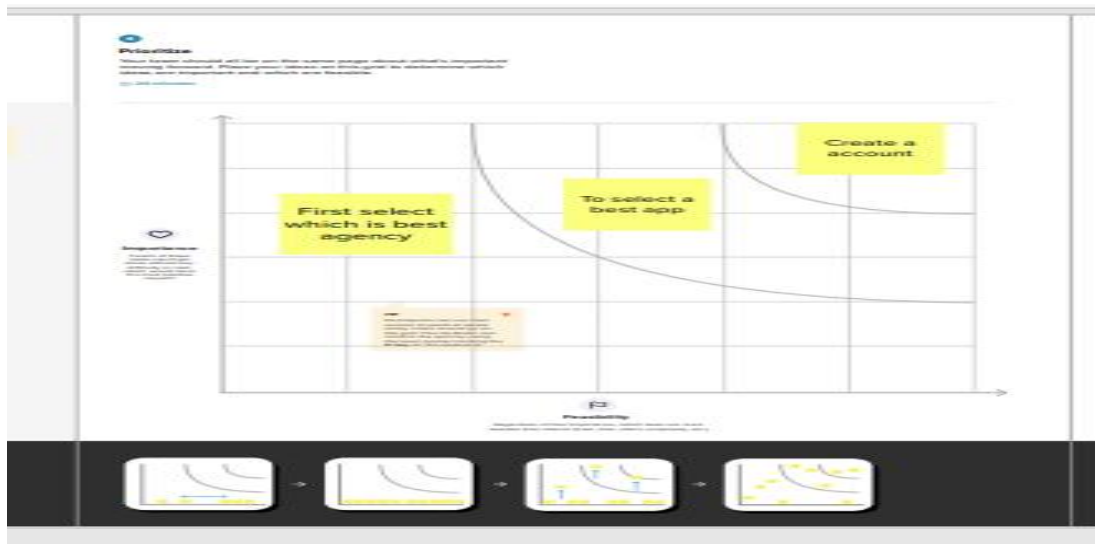
First select which is best agency	Create a account	Checks the custom objects

Person 5

Person 6

Person 7

Person 8

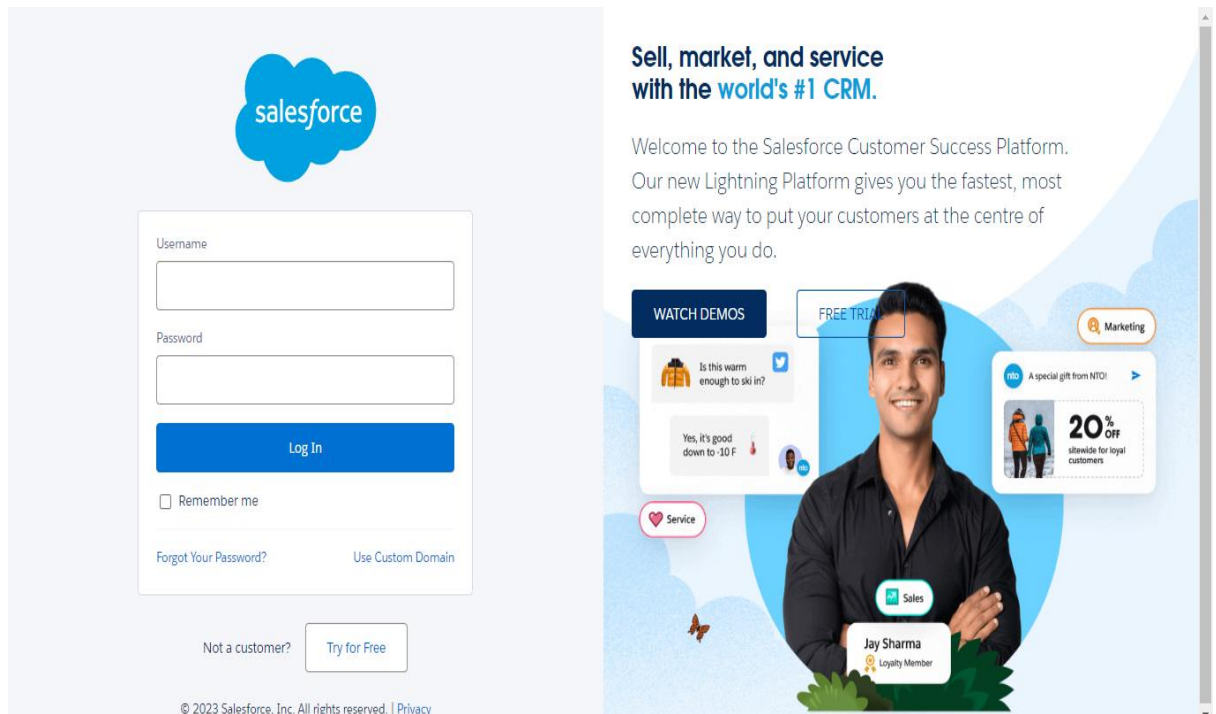


ACTIVITY AND SCREENSHOTS

1. Creation of Salesforce platform:

Go to [Developer.salesforce.com](https://developer.salesforce.com) and click on sign up. Enter our Detail as name, Email, Role, Company etc., Email is sent your mail id.

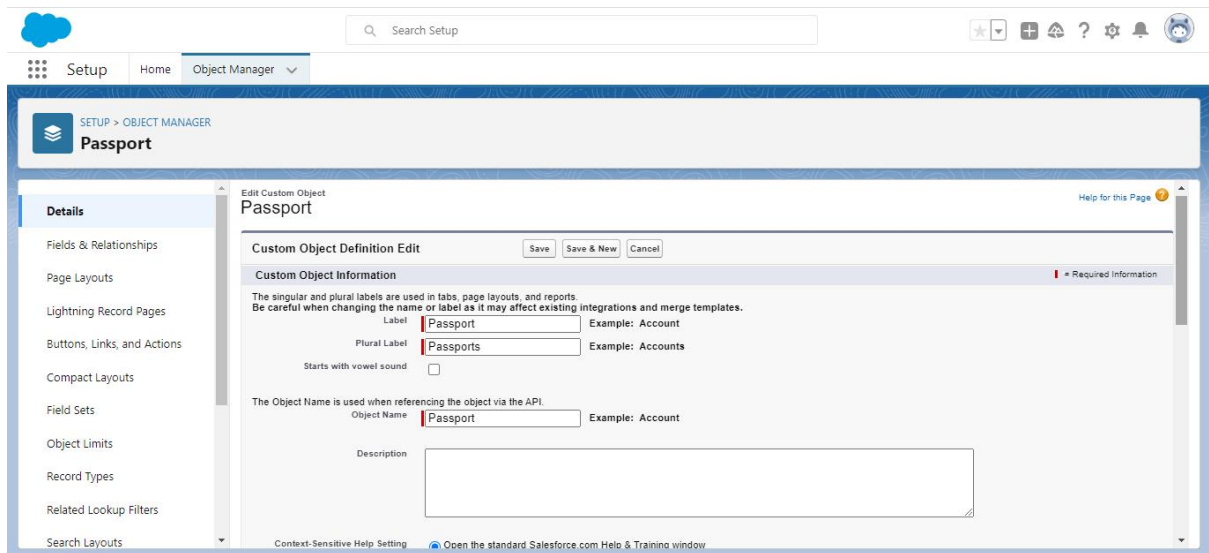
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



2. Creation of custom object:

Passport:

Navigate to setup to select object manager and create the object gives the detail like label name has passport and enter the plural name, record name, data type, etc., and save it.



Setup > OBJECT MANAGER
Passport

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Edit Custom Object
Passport

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

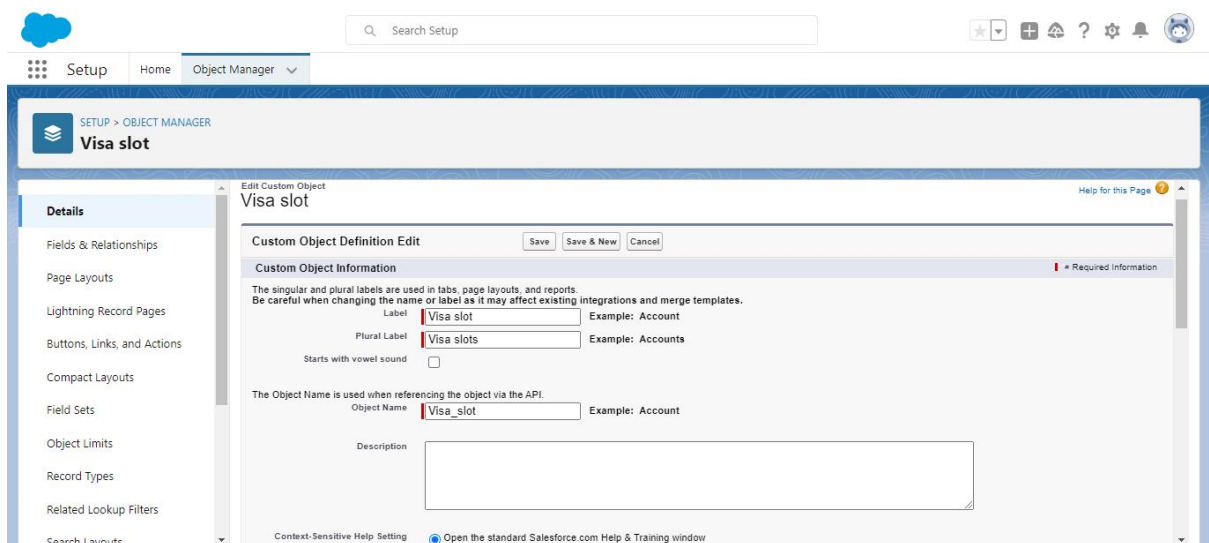
Object Name Example: Account

Description

Context-Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)

Objects involved in Book a visa are Visa slot, Payment, Reschedule/Cancel create in this type.

Visa slot:



Setup > OBJECT MANAGER
Visa slot

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Edit Custom Object
Visa slot

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)

Payment:

The screenshot shows the Salesforce Setup interface for editing the 'Payment' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Custom Object Payment' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes a warning: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' The form fields are: Label (Payment), Plural Label (Payments), Starts with vowel sound (unchecked), Object Name (Payment), and Description (empty text area). Examples provided are 'Example: Account' for the label and 'Example: Accounts' for the plural label. At the bottom, there is a 'Context-Sensitive Help Setting' with a link to 'Open the standard Salesforce.com Help & Training window'.

Setup > OBJECT MANAGER
Payment

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Edit Custom Object
Payment

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)

Reschedule:

The screenshot shows the Salesforce Setup interface for editing the 'Reschedule' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Custom Object Reschedule' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes a warning: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' The form fields are: Label (Reschedule), Plural Label (Reschedules), Starts with vowel sound (unchecked), Object Name (Reschedule), and Description (empty text area). Examples provided are 'Example: Account' for the label and 'Example: Accounts' for the plural label. At the bottom, there is a 'Context-Sensitive Help Setting' with a link to 'Open the standard Salesforce.com Help & Training window'.

Setup > OBJECT MANAGER
Reschedule

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Edit Custom Object
Reschedule

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)

Creation of Field on Custom object:

Passport

Select our Object from the selection has Passport and select option field and Relationship. Select our data type has number and go to the next page and enter the field label has Contact Number and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select the next option and save it. The passport field are created like this type.

Contact number:

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER
Passport

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit Passport Custom Field
Contact number

Custom Field Definition Edit

Field Information

Field Label: Contact number

Field Name: Contact_number

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Data Type: Number

Required: ☒ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☒ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

Default Value: Show Formula Editor

Number Options

Length: 10

Decimal Places: 0

Change Field Type | Save | Cancel

Full Name:

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER
Passport

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit Passport Custom Field
Full Name

Custom Field Definition Edit

Field Information

Field Label: Full Name

Field Name: Full_Name

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Data Type: Text

Required: ☒ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☒ Set this field as the unique record identifier from an external system

Default Value: Show Formula Editor

Text Options

Length: 10

Change Field Type | Save | Cancel

Passport Number:

The screenshot shows the 'Edit Passport Custom Field' configuration page for the 'Passport Number' field in the Salesforce Passport interface. The page is titled 'Edit Passport Custom Field: Passport Number' and includes a 'Help for this Page' link. The left sidebar contains navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area is divided into two sections: 'Field Information' and 'General Options'.

Field Information:

- Field Label:** Passport Number
- Field Name:** Passport_Number
- Description:** (Empty text area)
- Help Text:** (Empty text area)
- Data Owner:** User
- Field Usage:** --None--
- Data Sensitivity Level:** --None--
- Compliance Categorization:** Available (PII, HIPAA, GDPR, PCI) and Chosen (Empty list)

General Options:

- Required:** ☒ Always require a value in this field in order to save a record
- Unique:** ☐ Do not allow duplicate values
 - ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
 - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** ☒ Set this field as the unique record identifier from an external system
- Default Value:** [Show Formula Editor](#)

Text Options:

- Length:** 10

Buttons at the bottom include 'Change Field Type', 'Save', and 'Cancel'.

Permanent Address:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The left sidebar contains navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area is titled 'Edit Passport Custom Field' and 'Permanent Address'. It includes a 'Custom Field Definition Edit' section with buttons for 'Change Field Type', 'Save', and 'Cancel'. The 'Field Information' section contains the following fields:

- Field Label: Permanent Address
- Field Name: Permanent_Address
- Description: (empty text area)
- Help Text: (empty text area)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization: A list of categories (PII, HIPAA, GDPR, PCI) with 'Available' and 'Chosen' columns.

The 'General Options' section includes the following settings:

- Required: ☒ Always require a value in this field in order to save a record
- Unique: ☐ Do not allow duplicate values
- External ID: ☒ Set this field as the unique record identifier from an external system
- Default Value: (empty text area)

The 'Text Options' section includes the following settings:

- Length: 10

Creation of Field on Custom object: Visa slot

Select our Object from the selection has visa slot and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Location and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select

the next option and save it. The visa slot field are created like this type.

Location:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Edit Visa ext Custom Field Location' and contains the 'Custom Field Definition Edit' form. The form is divided into several sections: 'Field Information', 'General Options', and 'Text Options'. In the 'Field Information' section, the 'Field Label' and 'Field Name' are both set to 'Location'. The 'Data Type' is set to 'Text'. In the 'General Options' section, the 'Required' checkbox is checked, and the 'External ID' checkbox is also checked. The 'Text Options' section shows the 'Length' set to 10. The bottom of the form has buttons for 'Change Field Type', 'Save', and 'Cancel'.

Setup > OBJECT MANAGER
Visa slot

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Custom Field Definition Edit
Location

Field Information
Field Label: Location
Field Name: Location
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization:
Available: PII, HIPAA, GDPR, PCI
Chosen:

General Options
Required: ☒ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
Treat "ABC" and "abc" as duplicate values (case insensitive)
Treat "ABC" and "abc" as different values (case sensitive)
External ID: ☒ Set this field as the unique record identifier from an external system
Show Formula Editor
Text Options
Length: 10

Change Field Type Save Cancel

Time:

Setup > OBJECT MANAGER
Visa slot

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Edit Visa slot Custom Field
Time

Custom Field Definition Edit

Field Information

Field Label: Time
Field Name: Time
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization:
Available: PII, HIPAA, GDPR, PCI
Chosen:

General Options

Required: ☒ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
External ID: ☐ Set this field as the unique record identifier from an external system
Default value: Show Formula Editor

Text Options

Length: 10

Passport Number (Master):

Setup > OBJECT MANAGER
Visa slot

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Edit Visa slot Custom Field
Passport Number (Master)

Custom Field Definition Edit

Field Information

Field Label: Passport Number (Master)
Field Name: Passport_Number_Master
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization:
Available: PII, HIPAA, GDPR, PCI
Chosen:

General Options

Required: ☒ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
External ID: ☒ Set this field as the unique record identifier from an external system
Default value: Show Formula Editor

Number Options

Length: 10
Decimal Places: 0

Visa slot Number:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options under 'Fields & Relationships'. The main content area is titled 'Edit Visa slot Custom Field' and 'Visa slot number'. It contains a 'Custom Field Definition Edit' form with the following sections:

- Field Information:** Includes fields for 'Field Label' (Visa slot number), 'Field Name' (Visa_slot_number), 'Description', and 'Help Text'. The 'Data Type' is set to 'Text'. There are also dropdowns for 'Data Owner' (User), 'Field Usage' (--None--), and 'Data Sensitivity Level' (--None--). A 'Compliance Categorization' section shows a list of categories (PII, HIPAA, GDPR, PCI) with 'PII' selected.
- General Options:** Includes checkboxes for 'Required' (checked), 'Unique' (unchecked), 'External ID' (checked), and 'Default Value'. There are also radio buttons for 'Treat "ABC" and "abc" as duplicate values (case insensitive)' and 'Treat "ABC" and "abc" as different values (case sensitive)'. A 'Show Formula Editor' link is present.
- Text Options:** Includes a 'Length' field set to 10.

Buttons for 'Change Field Type', 'Save', and 'Cancel' are located at the top and bottom of the form.

Creation of Field on Custom object: Payment

Select our Object from the selection has payment and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Payment mode and length should be 10 at the bottom of the object you can find options like required, unique, external id select

required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select the next option and save it. The payment field are created like this type.

Payment mode:

The screenshot shows the 'Custom Field Definition Edit' page for a field named 'Payment mode'. The page is part of the 'Payment' object setup in Salesforce. The left sidebar contains navigation links for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', 'Triggers', 'Flow Triggers', and 'Validation Rules'. The main content area is divided into 'Field Information' and 'General Options' sections. In the 'Field Information' section, the 'Field Label' and 'Field Name' are both 'Payment mode'. The 'Data Type' is 'Text'. The 'Data Owner' is 'User'. The 'Field Usage' is 'None'. The 'Data Sensitivity Level' is 'None'. The 'Compliance Categorization' is 'PII', 'HIPAA', 'GDPR', and 'PCI'. In the 'General Options' section, the 'Required' checkbox is checked, and the 'Always require a value in this field in order to save a record' option is selected. The 'Unique' checkbox is unchecked. The 'External ID' checkbox is checked, and the 'Set this field as the unique record identifier from an external system' option is selected. The 'Default Value' is empty. The 'Text Options' section shows a 'Length' of '10'. The page has a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar is also present.

Setup > OBJECT MANAGER
Payment

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Custom Field Definition Edit
Payment mode

Field Information

Field Label: Payment mode
Field Name: Payment_mode
Description:
Help Text:
Data Owner: User
Field Usage: None
Data Sensitivity Level: None
Compliance Categorization: Available: PII, HIPAA, GDPR, PCI; Chosen:
Data Type: Text
Required Information

General Options

Required: ☒ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
External ID: ☒ Set this field as the unique record identifier from an external system
Default Value:
Show Formula Editor
Text Options
Length: 10

Transaction id (Auto Number):

Setup > OBJECT MANAGER > Payment

Edit Payment Custom Field
Transaction id (Auto number)

Custom Field Definition Edit [Change Field Type] [Save] [Cancel]

Field Information [Required Information]

Field Label: Transaction id (Auto number)
Field Name: Transaction_id_Auto_number
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) / Chosen

General Options

Required: ☒ Always require a value in this field in order to save a record
 Unique: ☐ Do not allow duplicate values
 External ID: ☒ Set this field as the unique record identifier from an external system
 Triggers: ☐ Use this field to store AI prediction scores
 Default Value: Show Formula Editor

Use formula syntax: Enclose text and literal values in double quotes. "This text" includes numbers without quotes. Do not use spaces as delimiters. ID, TID, and system date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__myRecordName.Field__c

Number Options

Length: 10
Decimal Places: 0

[Change Field Type] [Save] [Cancel]

Cancel Transaction:

Setup > OBJECT MANAGER > Payment

Edit Payment Custom Field
Cancel Transaction

Custom Field Definition Edit [Change Field Type] [Save] [Cancel]

Field Information [Required Information]

Field Label: Cancel Transaction
Field Name: Cancel_Transaction
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) / Chosen

General Options

Required: ☒ Always require a value in this field in order to save a record
 Unique: ☐ Do not allow duplicate values
 ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
 ☐ Treat "ABC" and "abc" as different values (case sensitive)
 External ID: ☒ Set this field as the unique record identifier from an external system
 Default Value: Show Formula Editor

Use formula syntax: Enclose text and literal values in double quotes. "This text" includes numbers without quotes. Do not use spaces as delimiters. ID, TID, and system date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__myRecordName.Field__c

Text Options

Length: 10

[Change Field Type] [Save] [Cancel]

Visa slot Number(master):

Creation of Field on Custom object: Reschedule

Select our Object from the selection has Reschedule and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Passport number(master) and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on

visible checkbox so that it is visible to all profiles and select the next option and save it. The reschedule field are created like this type.

Passport Number (Master):

The screenshot shows the 'Edit Reschedule Custom Field' form for 'Passport Number (Master)'. The form is divided into several sections:

- Field Information:** Contains fields for 'Field Label' (Passport Number (Master)), 'Field Name' (Passport_Number_Master), 'Description', and 'Help Text'. It also includes dropdowns for 'Data Owner' (User), 'Field Usage' (--None--), and 'Data Sensitivity Level' (--None--). A 'Compliance Categorization' section lists 'PII', 'HIPAA', 'GDPR', and 'PCI'.
- General Options:** Includes checkboxes for 'Required' (checked), 'Unique' (unchecked), and 'Always require a value in this field in order to save a record'. It also has options for 'Treat "ABC" and "abc" as duplicate values (case insensitive)' and 'Treat "ABC" and "abc" as different values (case sensitive)'. A checkbox 'Set this field as the unique record identifier from an external system' is checked. A 'Default Value' field is present with a 'Show Formula Editor' link.
- Text Options:** Includes a 'Length' field set to 10.

The form has 'Change Field Type', 'Save', and 'Cancel' buttons at the bottom.

Location:

Setup > OBJECT MANAGER
Reschedule

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit Reschedule Custom Field
Location

Custom Field Definition Edit

Field Information

Field Label: Location

Field Name: Location

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

Required: ☒ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

Default Value: Show Formula Editor

Text Options

Length: 10

Change Field Type Save Cancel

Time:

Setup > OBJECT MANAGER
Reschedule

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

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Related Lookup Filters

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List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit Reschedule Custom Field
Time

Custom Field Definition Edit

Field Information

Field Label: Time

Field Name: Time

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

Required: ☒ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

Default Value: Show Formula Editor

Number Options

Length: 10

Decimal Places: 0

Change Field Type Save Cancel

Cancel:

The screenshot shows the 'Custom Field Definition Edit' form in the 'Object Manager' section of the 'Reschedule' application. The form is titled 'Edit Reschedule Custom Field' and has a 'Cancel' button at the top left. The form is divided into three main sections: 'Field Information', 'General Options', and 'Text Options'. The 'Field Information' section includes fields for 'Field Label', 'Field Name', 'Description', and 'Help Text'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'External ID', and a text area for 'Default Value'. The 'Text Options' section includes a 'Length' field. The form is titled 'Custom Field Definition Edit' and has buttons for 'Change Field Type', 'Save', and 'Cancel'.

3. Creation of Relationship:

Relationship between objects

To create a Master Detail relationship between Passport and Visa. Select the object manager and select 'visa' object from the list and select fields and relationships and click on new. Select the data type has Master detail relationship and go to the next

page and save it. To create the relationship between payment and visa slot in this type.

Master Detail Relationship between passport and visa slot:

The screenshot displays the 'Edit Visa slot Custom Field' configuration page in Microsoft Dynamics 365. The page is titled 'Custom Field Definition Edit' and includes a search bar at the top. The left sidebar shows the 'Fields & Relationships' section selected. The main content area is divided into three sections: 'Field Information', 'Master-Detail Options', and 'Lookup Filter'. In the 'Field Information' section, the 'Field Label' and 'Field Name' are both set to 'Passport', and the 'Data Type' is 'Master-Detail'. The 'Master-Detail Options' section shows the 'Related To' field as 'Passport' and the 'Child Relationship Name' as 'Visa_slots'. The 'Lookup Filter' section is currently empty. The page also includes a 'Save' button and a 'Cancel' button at the bottom.

Master Detail Relationship between payment and visa slot:

The screenshot shows the Salesforce Setup interface for editing a custom field named 'Visa slot'. The left sidebar contains navigation links such as 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', 'Triggers', 'Flow Triggers', and 'Validation Rules'. The main content area is titled 'Edit Payment Custom Field Visa slot' and includes a 'Custom Field Definition Edit' section with 'Change Field Type', 'Save', and 'Cancel' buttons. Below this, the 'Field Information' section contains fields for 'Field Label' (Visa slot), 'Field Name' (visa_slot), 'Description', 'Help Text', 'Data Owner' (User), 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available, PII, HIPAA, GDPR, PCI). The 'Master-Detail Options' section shows 'Related To' (Visa slot), 'Related List Label' (Payments), 'Child Relationship Name' (Payments), and 'Sharing Setting' (Read/Write). The 'Lookup Filter' section includes a link to 'Show Filter Settings'.

4. Creation of App:

Navigate to setup and search for app manager. To select an option for a new lightning app. Give the app name has book my visa and upload the picture and click next. Choose the app option as navigation style- standard navigation, support from factors-desktop mobile and select next. And move the objects from available items to selected items. Passport, visa slots, payments, reschedule to selected items. And system admin profile to available items to selected items.

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Book my Visa

🔍 Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Book my Visa

* Developer Name ⓘ


Book_my_Visa

Description ⓘ

Enter a description...

App Branding

Image ⓘ



Primary Color Hex Value ⓘ

■


#0070D2

Clear

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Book my Visa

🔍 Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor ⓘ

* Navigation Style

☒ Standard navigation

☐ Console navigation

* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

Setup and Personalization ⓘ

Setup Experience

☒ Setup (full set of Setup options)

☐ Service Setup

App Personalization Settings

☐ Disable end user personalization of nav items in this app

☐ Disable temporary tabs for items outside of this app

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

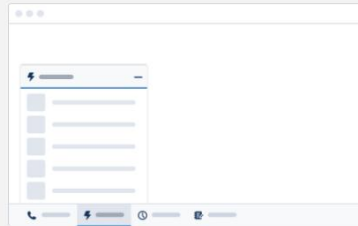
Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment  Default ▾

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

 Create ▾

🔍 Type to filter list...

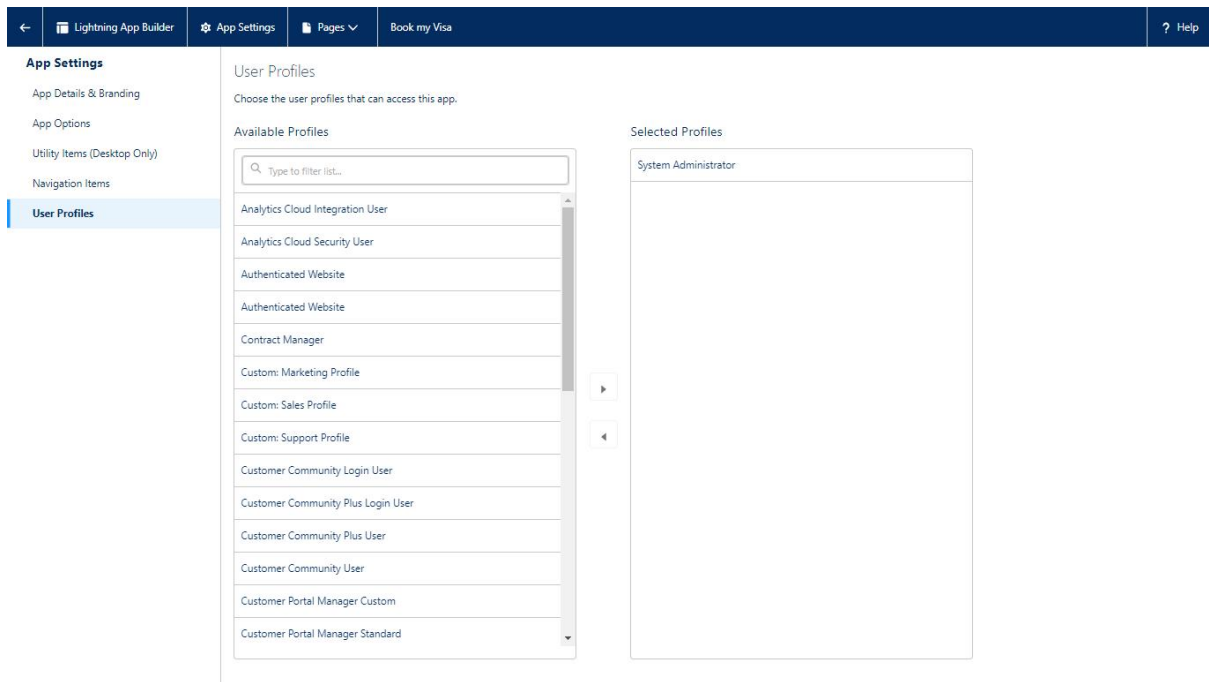
- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets
- Async Operation Logs
- Authorization Form



Selected Items

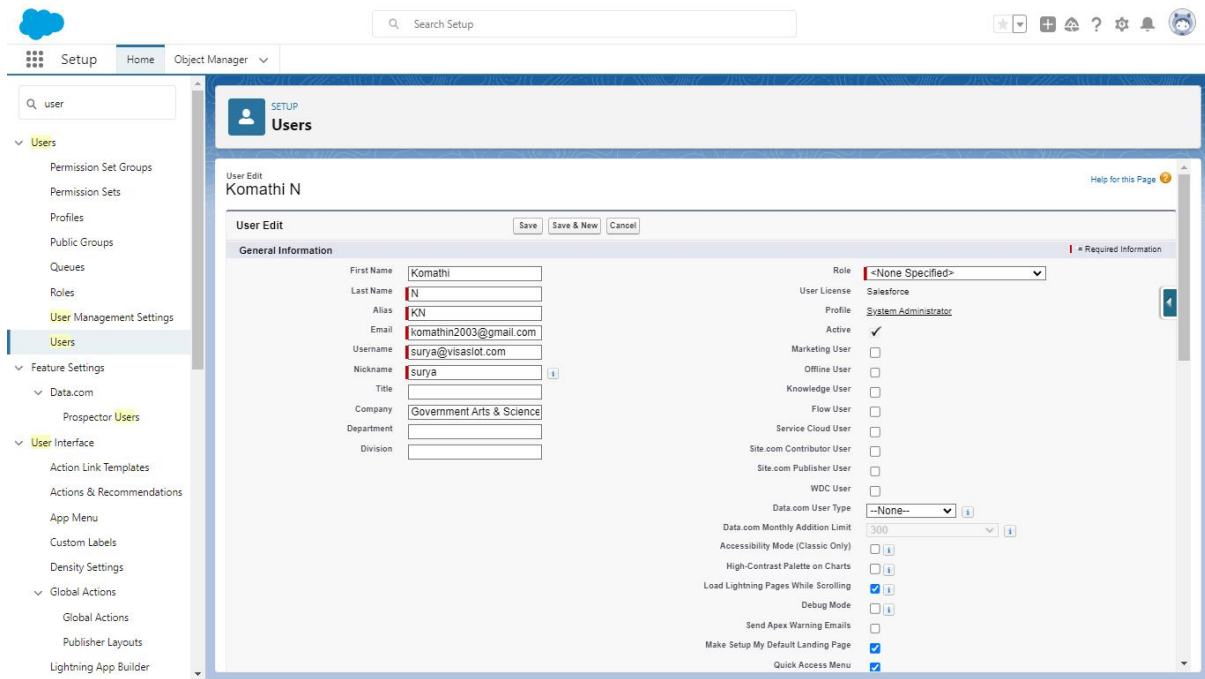
- Passports
- Visa slots
- Reschedules
- Payments





5. Creation of User:

Navigate to setup in quick find search bar, Type user in and select it and click on new user. Give the first name and last name and enter your email in the email field. Enter username; it must be unique. Select the user license of salesforce. In the profile field select standard user. At the bottom of the page check the box to generate a new password and save the page.



OWD: Organization wide default settings

This can be used to give permissions to the organization wide and it can be used for restrict the access, we can control the record level access.

Go to the setup to find out the sharing setting selected it. Edit the organization – wide Default and Select the passport and change the default external access to Public/Read/write.

6. Create a report:

Click on the app launcher and search for book a visa. Select the report and click new report, select the report type has passport with visa slot with payment and select start report. Left side of the report you can find the outline pane. In the group row select location and group column select passport; passport number to display and add the column select has visa slot number.

Book my Visa Passports Visa slots Reschedules Payments Reports

REPORT

Passport with visa locations Passports with Visa slots with Payments

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Outline

Groups

GROUP ROWS

Add group...

Location

GROUP COLUMNS

Add group...

Passport ID

Columns

Add column...

Passport Number

Visa slot number

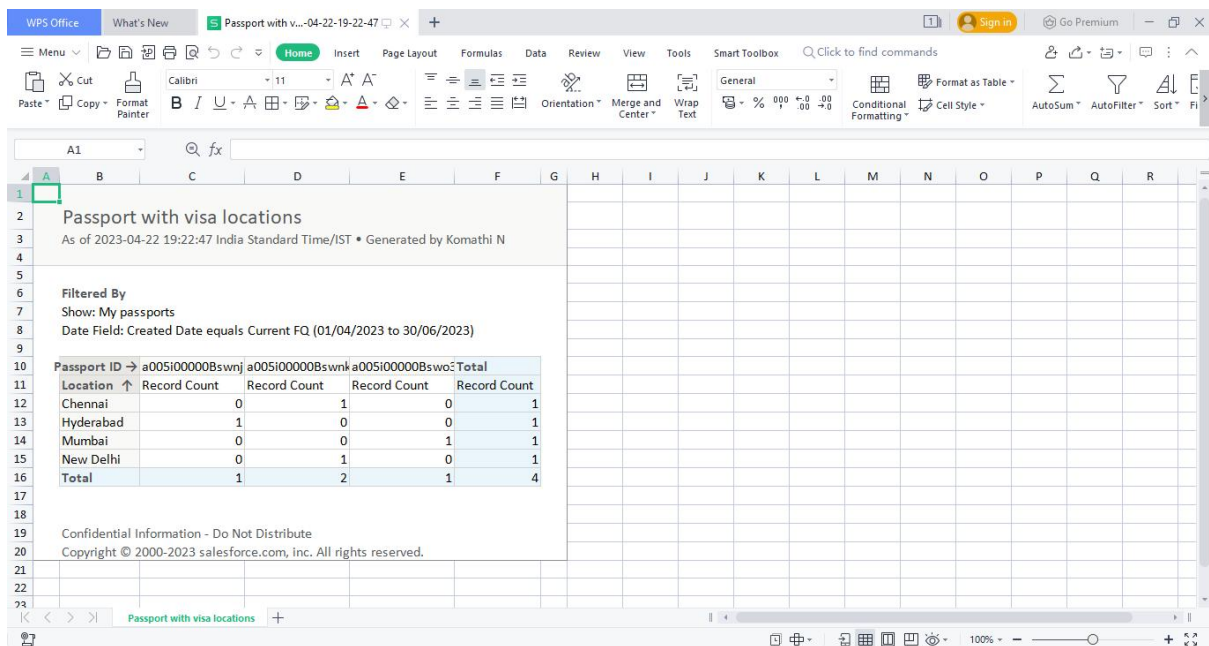
Location	Passport ID	a005i000008swrk	a005i000008swrk	a005i000008swrk3	Total
Chennai	Record Count	0	1	0	1
Hyderabad	Record Count	1	0	0	1
Mumbai	Record Count	0	0	1	1
New Delhi	Record Count	0	1	0	1
Total	Record Count	1	2	1	4

Details (4 Rows) Click an intersection in the table above to filter details.

	Passport Number	Visa slot number
1	09rf243	V-00001
2	3536we	V-00004
3	09rf243	V-00003
4	09rf243	V-00002
5		

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

Edit the filters as show me select all passport and passport creator date select all time finally save and run it. Go to the edit option and click exports select excel sheets format and click export. We can see the detail in the excel sheets as shown.



Passport with visa locations
As of 2023-04-22 19:22:47 India Standard Time/IST • Generated by Komathi N

Filtered By
Show: My passports
Date Field: Created Date equals Current FQ (01/04/2023 to 30/06/2023)

Location	Record Count	Record Count	Record Count	Total
Chennai	0	1	0	1
Hyderabad	1	0	0	1
Mumbai	0	0	1	1
New Delhi	0	1	0	1
Total	1	2	1	4

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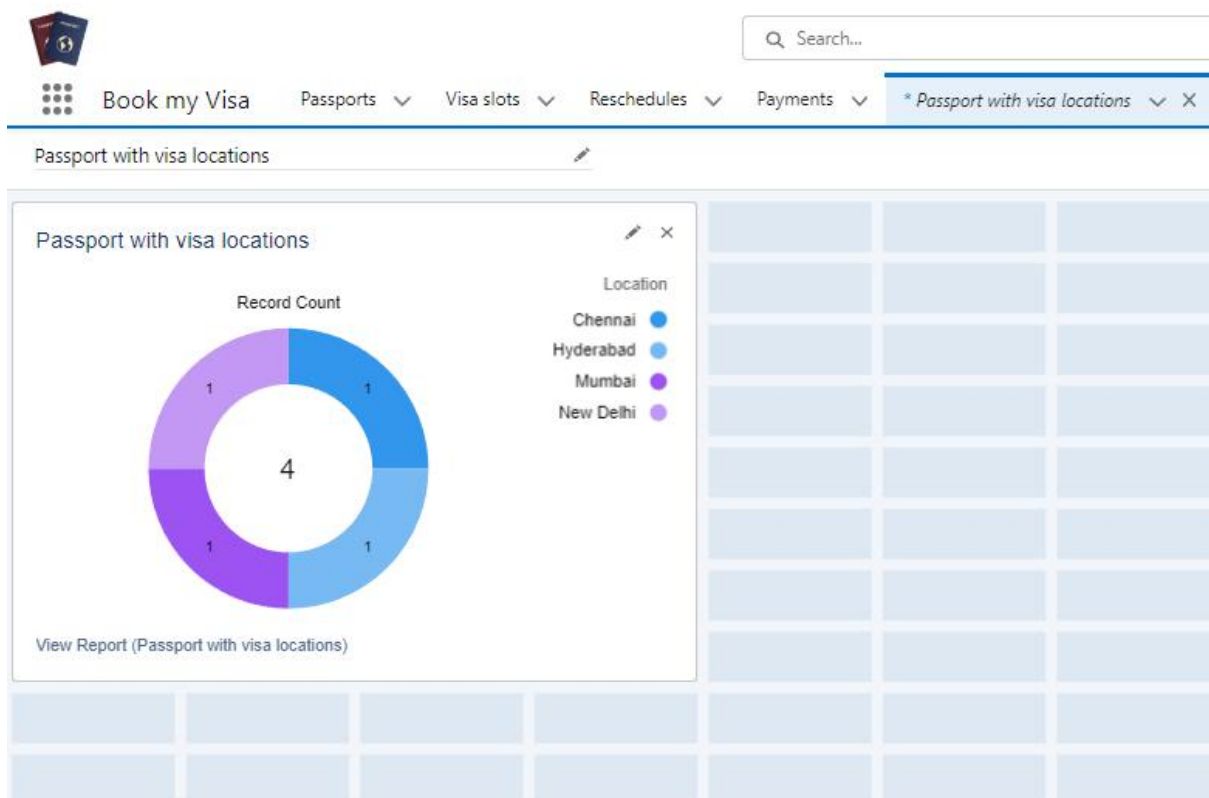
7.Create a Dashboard:

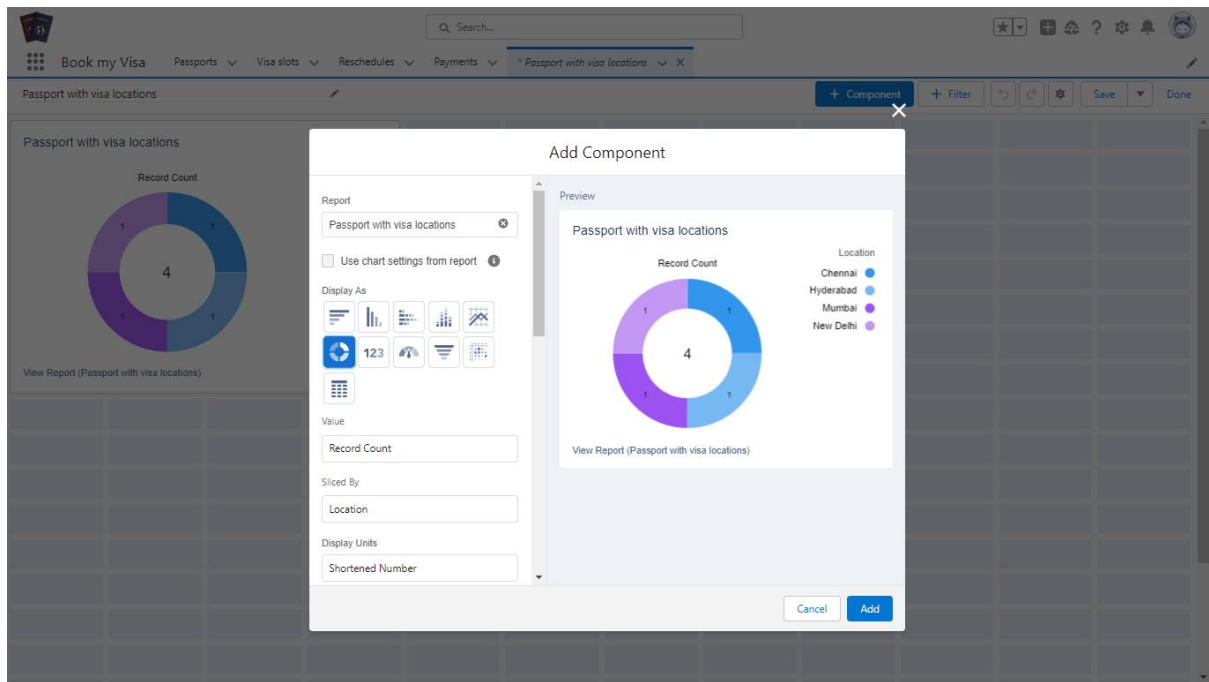
Click on the app launcher, search for Book a visa and search for dashboards. Select the new dashboard option. Name the dashboard has a Passport with visa locations. And select create option. Now click

on Add component and for report select passport with locations.

Select the donut chart as selection.

Ensure the value is record count and sliced by locations.
Click add and save the dashboard.





ADVANTAGES AND DISADVANTAGES

Advantages:

- *Saving time.*
- *Processing is fast.*

- Not much paper work.
- Easiest way.
- No wandering.

Disadvantages:

- Internet connection problem is there.
- Poor communication.
- Lack of leadership.
- Burdensome data entry.
- Poor connection leads to troubles and anxiety.
- Can be costly.

APPLICATIONS

This will help you to track and manage the availability of visa slot, which are appointments that are required for certain visa applications.

CRM is a well-conceived business strategy with long terms outcomes the maximize profitability, revenue and customer satisfaction by organizing around customer segment, fostering customer satisfying actions and implementing customer centric process.

CRM is a strategy employed to learn and understand customer need wants and behavior in order to develop stronger and sustained relationship with them.

CONCLUSION

By using the CRM application, we should track and manage the availability of visa slots easily. Booking visa slots will be in an easier way.

It is a beneficial and useful one for the customers. Save the time and often visiting trouble is not there.

FUTURE SCOPE

In the space of just few years, CRMs have evolved enormously. Approachable and far easier to learn, implement, and pay for, they've morphed from three-letter monsters into ready-set-go software for businesses of all shapes and sizes.

APPENDIX

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*Team member: GOWTHAM R -
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*Team member: KALAISELVI V -
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